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## **Insert ‘Requirements Matrix’ Here**

## **OCTS 2.0 Screens and Views**

This section will provide a screen by screen description of the functionality of OCTS 2.0. Each screen section is divided into subsections, 1 section for each view available on the screen. Each view subsection provides a sample screen print of the view, a summary of the main purpose of the view, and a summary of the major features of each applet that comprise a view.

## **“Cases” Screen**

### **Screen Description:**

The “Cases” Screen contains nine views that are dedicated to entering, displaying, and using case data. The first three screens focus specifically on case information. The rest of the views provide the ability to create activities related to specific cases, attach files such as customer documentation to the case, create sub-issues for complex cases, gain access to the system encyclopedia, and monitor case metrics via the charts section. A customer satisfaction survey is also available to monitor how well the customers perceive the service provided.

Following is a list of the views that comprise the “Cases” Screen. More details for each view are available in the subsequent pages of this document.

- My Cases
- My Team's Cases
- All Cases
- Activities
- Attachments
- Customer Satisfaction Survey
- Case Issues
- Results Search
- Charts

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For a detailed data mapping please refer to Appendix B-2

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## **Issues Screen**

### **Screen Description:**

The Issues Screen contains five views that are dedicated to entering, displaying, and using issue data. The primary purpose of this screen is to view all issues, to add results to issues, and monitor issue metrics via the charts view. Activities and attachments may be added to issues within the views of this screen, but caution must be used because activities and attachments associated with an issue will not be associated directly with case.

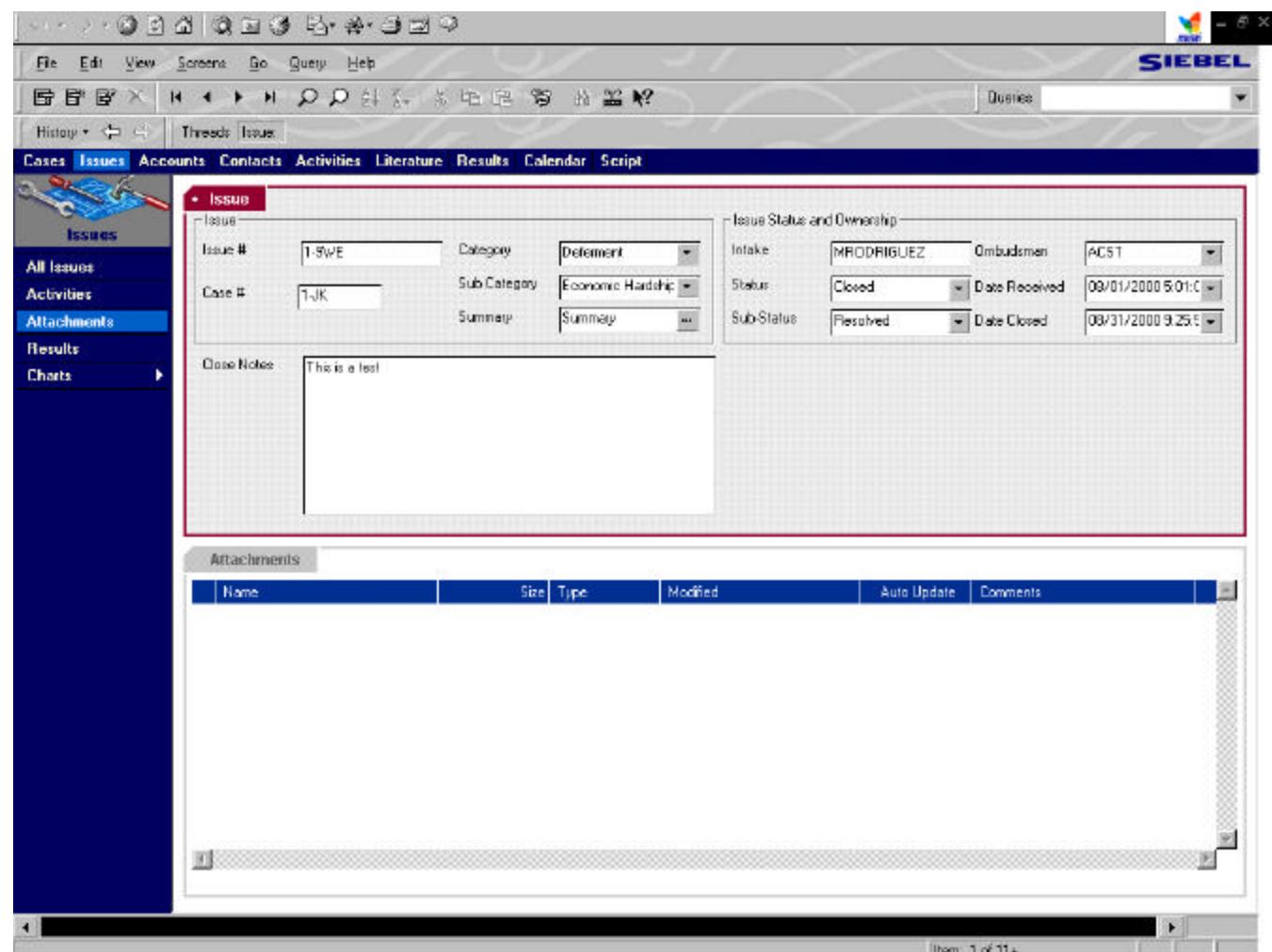
Following is a list of views that comprise the Issues Screen. More details for each screen are available in the subsequent pages of this document

All Issues  
Activities  
Attachments  
Results  
Charts

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## Attachments View



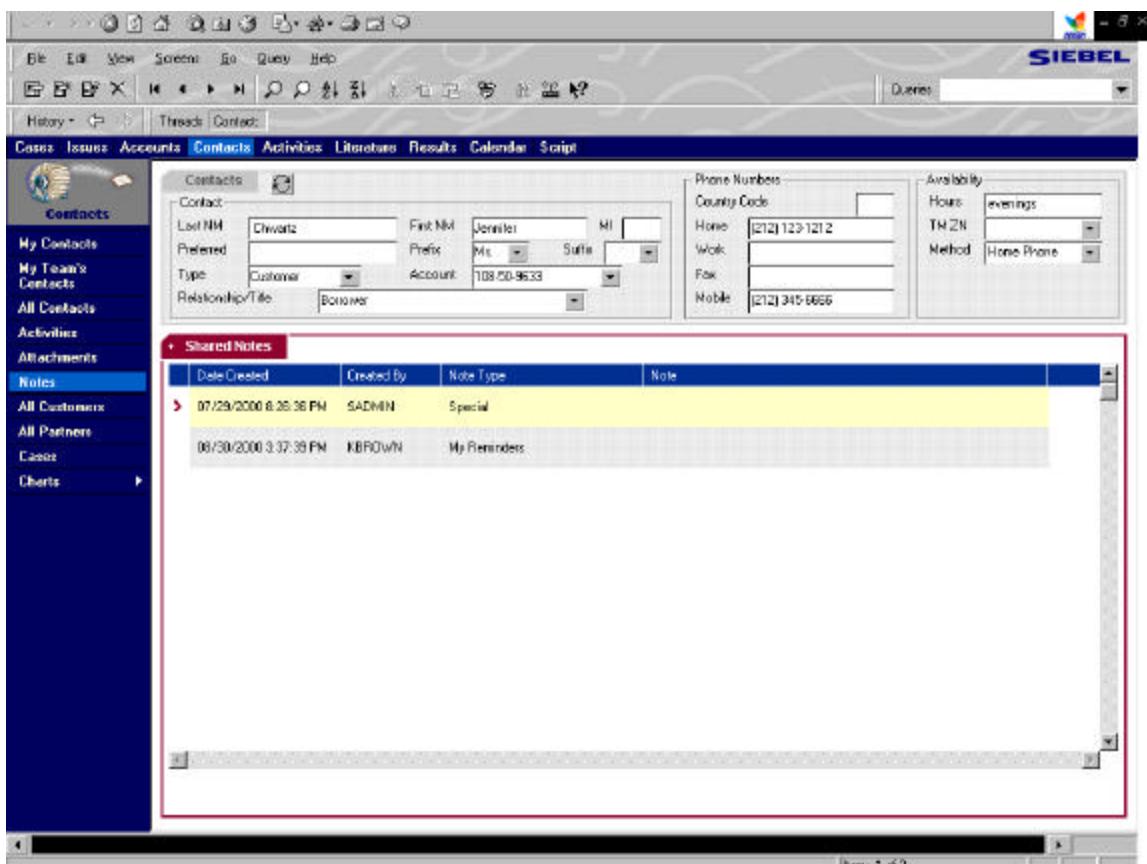
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## **Accounts Screen**

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## Contacts Screen

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## All Partners View

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The screenshot shows the Siebel application interface. The main window title is "Siebel". The top menu bar includes File, Edit, View, Screen, Go, Query, Help, History, Thread, Contact, Cases, Issues, Accounts, Contacts, Activities, Literature, Results, Calendar, Script. The "Contacts" tab is selected. On the left, a sidebar menu lists: Contacts, My Contacts, My Team's Contacts, All Contacts, Activities, Attachments, Notes, All Customers, All Partners (selected), Cases, Charts. The main content area is titled "+ Partners". It displays a grid of contact information:

Contact Type	Relationship/Title	Account	First Name	Last Name	Suffix	M
Partner	Co-signer/Co-maker	000-99-9000	Bob	Boo	II	
Partner	Co-signer/Co-maker	000-99-9000	Boo	Boo	II	A
Partner	Borrower's Spouse		Lizzy	Boo	IV	A
Partner	Borrower's Parent/Guardian		Doctor	Bob	II	
Partner	Special Case Contact	000-38-2534	Scott	Boo	II	B
Partner	Special Case Contact	Siebel	Bob	Boo		A

Below the grid is a navigation bar with letters A-Z and a search bar. At the bottom of the window, there are tabs for New, Delete, Copy, and Cancel, along with sections for Phone Numbers, Availability, Address, and Email. The address section shows Street: 66 Boo Ln, City: Boo, State: MA, Zip: 22015, and Country: USA. The email section has fields for 1st and 2nd email addresses and a note about including email or homepage addresses.

## **Activities Screen**

### **Screen Description:**

The Activities Screen contains seven views that are dedicated to entering, displaying, and using activity data. The first four views focus specifically on activity information. The rest of the views provide the ability to create and track “to do” items based on a specific activity, attach files such as customer documentation to the activity, and monitor activity metrics via the charts section.

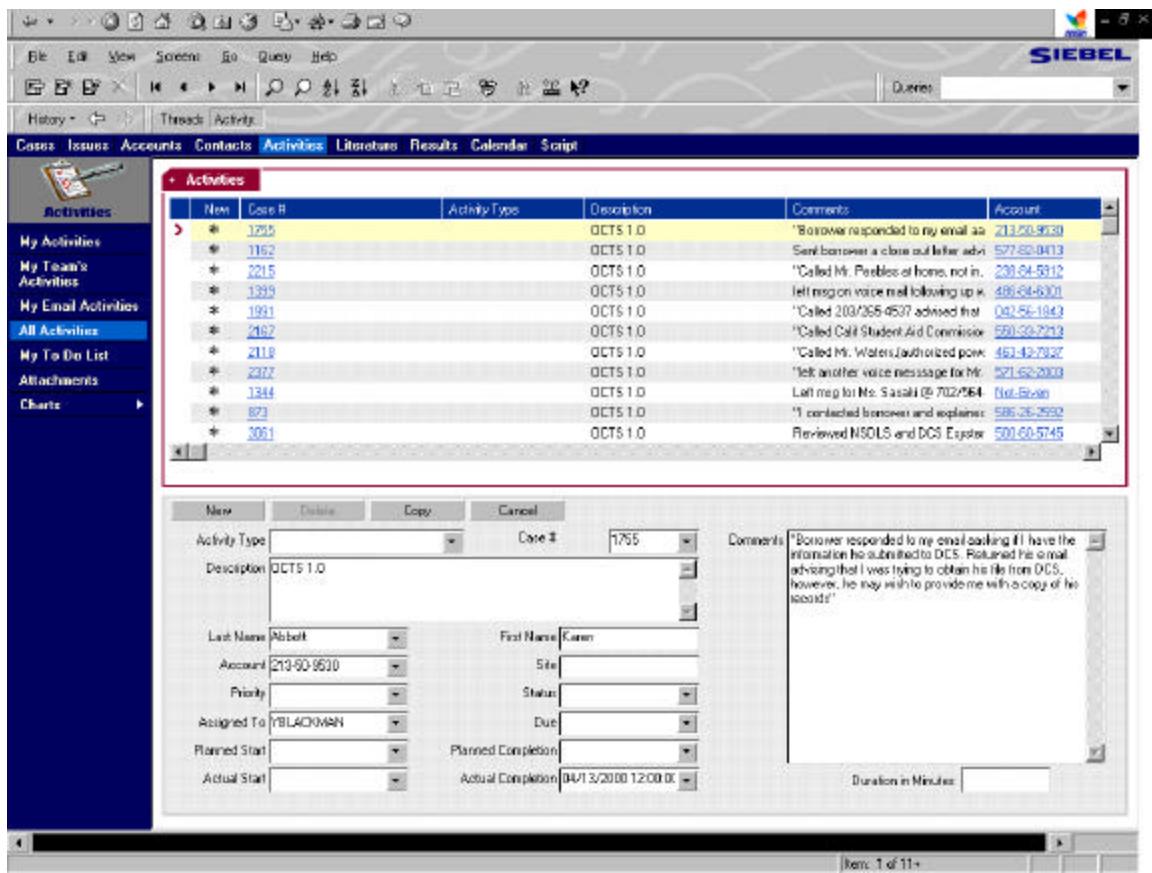
Following is a list of the views that comprise the Activity Screen. More details for each view are available in the subsequent pages of this document.

- My Activities
- My Team’s Activities
- All Activities
- My To Do List
- Attachments
- Charts

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## **All Activities View**



### **View Description:**

This view's primary purpose is to allow quick searches for specific activities, to display full details for a particular activity while viewing a list of all activities, and to enter a new activity.

#### **OCTS Activity List Applet: *top half of view***

The list applet allows the user to scroll through a list of all activities, or to select a subset of activities to view by using the query feature. To facilitate efficient work on an activities, hyperlinks in some fields provide quick navigation to a different screen/view to provide detailed case information.

For a detailed data mapping please refer to Appendix B-9

#### **OCTS Activity Form Applet: *bottom half of view***

The form applet displays all pertinent activity information for a given activity in a single, scroll-free display. The data displayed is that of the active activity in the list applet above (the selected activity with the red arrow in left-most column). A "New" button quickly creates a new activity, and the form applet provides an intuitive, efficient method of activity data entry.

For a detailed data mapping please refer to Appendix B-10

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## **Results Screen**

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### **View Description:**

Smartsheets are designed to help the Intake Specialist gather data from a caller in an accurate and consistent manner. The client has expressed concern that many fields within OCTS 1.0 were not routinely populated. Smartsheets will help to facilitate this by outlining various scenarios that will guide the Intake Specialists from taking a callers information and creating and transcribing a case and/or case related information.

The scenarios are listed below:

### **Scripting Scenarios:**

1. New Customer/New Case – Borrower Calls: Utilized to create a new case when the caller is the borrower and has not called the OMBUDSMAN office before. **(See scripting scenarios requirements 1 & 2, following)**
2. New Customer/New Case – Third Party Calls: Utilized to create a new case when the caller is a third party and has not called the OMBUDSMAN office before. **(See scripting scenarios requirements 3, following)**
3. Existing Customer/Existing Case – Status or Demographic Update: Utilized when an existing customer calls back to the OMBUDSMAN office to request a status update or make changes to information they provided earlier. **(See scripting scenarios requirements 4, following)**
4. Existing Customer/New Case – Borrower Calls: Utilized when a customer exists in the database but is creating a new case. The caller is the borrower. **(See scripting scenarios requirements 5, following)**
5. Existing Customer/New Case – Third Party Calls: Utilized when a customer exists in the database but is creating a new case. The caller is a third party. **(See scripting scenarios requirements 5, following)**



## **Appendix**

## Appendix B-3: Issues List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Issue #	Issue Number	DEFECT_NUM	S_PROD_DEF ECT		Application Generated
Y	Y	Issue Category	OI Category	ATTRIB_01	S_PROD_DEF ECT_X		SR Area Pick Applet
Y	Y	Issue Sub Category	OI Sub Category	ATTRIB_02	S_PROD_DEF ECT_X		SR Sub Area Hierarchical Pick Applet
Y	N	Issue Summary	OI Summary	ATTRIB_47	S_PROD_DEF ECT_X		User Entry
N	N	Intake	Created By Name	LOGIN	CREATED BY PERSON system field		Application Populated
N	Y	Status	Status	STATUS_CD	S_PROD_DEF ECT		PickList SR Status
N	Y	Sub-Status	Sub_Status	SUB_STATUS_CD	S_PROD_DEF ECT		PickList PD Sub-Status
N	N	Ombudsman	Owner	LOGIN	S_EMPLOYEE		Application Populated
N	N	Date Received	Date Opened	OPEN_DT	S_PROD_DEF ECT		Application Populated
N	N	Date Closed	Date Closed	CLOSE_DT	S_PROD_DEF ECT		User Entry/ Calendar
N	N	Close Notes	Description	DESC_TEXT	S_PROD_DEF ECT		User Entry
Y	N	Case #	SR Number	SR_NUM	S_SRV_REQ		Application Populated

## Appendix B-4: Issues Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Issue #	Issue Number	DEFECT_NUM	S_PROD_DEF ECT		Application Generated
Y	Y	Issue Category	OI Category	ATTRIB_01	S_PROD_DEF ECT_X		SR Area Pick Applet
Y	Y	Issue Sub Category	OI Sub Category	ATTRIB_02	S_PROD_DEF ECT_X		SR Sub Area Hierarchical Pick Applet
Y	N	Issue Summary	OI Summary	ATTRIB_47	S_PROD_DEF ECT_X		User Entry
N	N	Intake	Created By Name	LOGIN	CREATED BY PERSON system field		Application Populated
N	Y	Status	Status	STATUS_CD	S_PROD_DEF ECT		PickList SR Status
N	Y	Sub-Status	Sub_Status	SUB_STATUS_CD	S_PROD_DEF ECT		PickList PD Sub-Status
N	N	Ombudsman	Owner	LOGIN	S_EMPLOYEE		Application Populated
N	N	Date Received	Date Opened	OPEN_DT	S_PROD_DEF ECT		Application Populated
N	N	Date Closed	Date Closed	CLOSE_DT	S_PROD_DEF ECT		User Entry/ Calendar
N	N	Close Notes	Description	DESC_TEXT	S_PROD_DEF ECT		User Entry
Y	N	Case #	SR Number	SR_NUM	S_SRV_REQ		Application Populated

## Appendix B-5: Account List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
Y	N	Last NM	Last Name	ATTRIB_34	S_ORG_EXT_X		User Entry
Y	N	First NM	First Name	ATTRIB_38	S_ORG_EXT_X		User Entry
Y	N	MI	Middle Name	ATTRIB_05	S_ORG_EXT_X		User Entry
Y	N	Preferred	Preferred Name	ATTRIB_37	S_ORG_EXT_X		User Entry
Y	N	Prefix	M/M	ATTRIB_06	S_ORG_EXT_X		PickList MrMs
Y	N	Suffix	Suffix	ATTRIB_07	S_ORG_EXT_X		OCTS Suffix Picklist
N	N	Account Type	Type	OU_TYPE_CD	S_ORG_EXT		PickList Account Type
N	Y	Account	Name	NAME	S_ORG_EXT	Account/Cases	User Entry
Y	N	DOB	Birth Date	EXCH_DT	S_ORG_EXT		User Entry/Cale ndar
N	N	Address	Street Address	ADDR	S_ADDR_ORG		User Entry
N	N	City	City	CITY	S_ADDR_ORG		User Entry
N	N	State	State	STATE	S_ADDR_ORG		PickList State
Y	N	Zip	Postal Code	ZIPCODE	S_ADDR_ORG		User Entry
Y	N	Country	Country	COUNTRY	S_ADDR_ORG		PickList Country
N	N	Site	Location	LOC	S_ORG_EXT		User Entry
Y	N	Country Code	Assignment Country Code	ASGN_PH_CC	S_ORG_EXT		User Entry
Y	N	Home Phone Number	Main Phone Number	MAIN_PH_NUM	S_ORG_EXT		User Entry
N	N	Work Phone Number	Work Phone Number	PH_NUM	S_ADDR_ORG		User Entry
Y	N	Fax Phone Number	Main Fax Number	MAIN_FAX_PH_NUM	S_ORG_EXT		User Entry
Y	N	Mobile Phone	Mobile Phone Number	FAX_PH_NUM	S_ADDR_ORG		User Entry

		Number					
Y	N	1st E-mail	Home Page	URL	S_ORG_EXT		User Entry
Y	N	2nd E-mail	Secondary Email	EMAIL_ADDR	S_ADDR_ORG		User Entry
Y	N	Hours Available	Hrs Avail	ATTRIB_01	S_ORG_EXT_X		User Entry
Y	N	Time Zone	Time Zone	TAX_EXEMPT_N UM	S_ORG_EXT		PickList TimeZone
N	Y	Contact Method	Contact Method	ATTRIB_39	S_ORG_EXT_X		OCTS Contact Method Picklist
N	N	Comments	Description	DESC_TEXT	S_ORG_EXT		User Entry
N	N	Reminders	Reminders	ATTRIB_36	S_ORG_EXT_X		Siebel VB Code

## Appendix B-6: Account Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
Y	N	Last NM	Last Name	ATTRIB_34	S_ORG_EXT_X		User Entry
Y	N	First NM	First Name	ATTRIB_38	S_ORG_EXT_X		User Entry
Y	N	MI	Middle Name	ATTRIB_05	S_ORG_EXT_X		User Entry
Y	N	Preferred	Preferred Name	ATTRIB_37	S_ORG_EXT_X		User Entry
Y	N	Prefix	M/M	ATTRIB_06	S_ORG_EXT_X		PickList MrMs
Y	N	Suffix	Suffix	ATTRIB_07	S_ORG_EXT_X		OCTS Suffix Picklist
N	N	Account Type	Type	OU_TYPE_CD	S_ORG_EXT		PickList Account Type
N	Y	Account	Name	NAME	S_ORG_EXT		User Entry
Y	N	DOB	Birth Date	EXCH_DT	S_ORG_EXT		User Entry/Calendar
N	N	Address	Street Address	ADDR	S_ADDR_ORG		User Entry
N	N	City	City	CITY	S_ADDR_ORG		User Entry
N	N	State	State	STATE	S_ADDR_ORG		PickList State
Y	N	Zip	Postal Code	ZIPCODE	S_ADDR_ORG		User Entry
Y	N	Country	Country	COUNTRY	S_ADDR_ORG		PickList Country
N	N	Site	Location	LOC	S_ORG_EXT		User Entry
Y	N	Country Code	Assignment Country Code	ASGN_PH_CC	S_ORG_EXT		User Entry
Y	N	Home Phone Number	Main Phone Number	MAIN_PH_NUM	S_ORG_EXT		User Entry
N	N	Work Phone Number	Work Phone Number	PH_NUM	S_ADDR_ORG		User Entry
Y	N	Fax Phone Number	Main Fax Number	MAIN_FAX_PH_NUM	S_ORG_EXT		User Entry
Y	N	Mobile Phone	Mobile Phone Number	FAX_PH_NUM	S_ADDR_ORG		User Entry

		Number					
Y	N	1st E-mail	Home Page	URL	S_ORG_EXT		User Entry
Y	N	2nd E-mail	Secondary Email	EMAIL_ADDR	S_ADDR_ORG		User Entry
Y	N	Hours Available	Hrs Avail	ATTRIB_01	S_ORG_EXT_X		User Entry
Y	N	Time Zone	Time Zone	TAX_EXEMPT_N UM	S_ORG_EXT		PickList TimeZone
N	Y	Contact Method	Contact Method	ATTRIB_39	S_ORG_EXT_X		OCTS Contact Method Picklist
N	N	Comments	Description	DESC_TEXT	S_ORG_EXT		User Entry
N	N	Reminders	Reminders	ATTRIB_36	S_ORG_EXT_X		Siebel VB Code

## Appendix B-7: Contact List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Last NM	Last Name	LAST_NAME	S_CONTACT	Contacts/Activities	Pick Map/User Entry
N	Y	First NM	First Name	FST_NAME	S_CONTACT		Pick Map/User Entry
N	N	MI	Middle Name	MID_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Preferred	Alias	ALIAS_NAME	S_CONTACT		Pick Map/User Entry
N	N	Prefix	M/M	PER_TITLE	S_CONTACT		Pick Map/'PickList MrMs' - Picklist
Y	N	Suffix	Suffix	PER_TITLE_SUFFIX	S_CONTACT		Pick Map/'OCTS Suffix Picklist' - Picklist
Y	N	Contact Type	Contact Type	CON_CD	S_CONTACT		'OCTS Contact Type Picklist' – Picklist
N	N	Account	Account	NAME	S_ORG_EXT	Account/Contacts	'OCTS Account Pick Applet' – Pick Applet
Y	Y	Relationship>Title	Job Title	JOB_TITLE	S_CONTACT		'OCTS Relationship to Case/Issue' – Picklist
N	N	Address	Address	ATTRIB_47	S_CONTACT_X		Pick Map/User Entry
N	N	City	Contact City	MAIDEN_NAME	S_CONTACT		Pick Map/User Entry
N	N	State	Contact State	NATIONALITY	S_CONTACT		Pick Map/'PickList

							State' – Picklist
N	N	Zip	Zip Code	EMP_NUM	S_CONTACT		Pick Map/User Entry
N	N	Country	Contact Country	EMPLMNT_STAT_CD	S_CONTACT		Pick Map/'PickList Country' – Picklist
Y	N	Country Code	Country Code	ALT_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Home Phone Number	Home Phone #	HOME_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Work Phone Number	Work Phone #	WORK_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Fax Phone Number	Fax Phone #	FAX_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Mobile Phone Number	Cellular Phone #	CELL_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	1st E-mail	Email Address	EMAIL_ADDR	S_CONTACT		Pick Map/User Entry
Y	N	2nd E-mail	Secondary Email	NICK_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Hours Available	Hrs Avail	CON_MANAGER_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Time Zone	Time Zone	TZONE_CD	S_CONTACT		Pick Map/'PickList TimeZone' – Picklist
Y	Y	Contact Method	Assistant	CON_ASST_NAME	S_CONTACT		Pick Map/'OCTS Contact Method Picklist' - Picklist
Y	N	Special Note/SME	Comment	COMMENTS	S_CONTACT		User Entry
Y	Y	Loan Status	Loan Status	ATTRIB_40	S_SRV_REQ_X		User Entry

## Appendix B-8: Contact Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Last NM	Last Name	LAST_NAME	S_CONTACT		Pick Map/User Entry
N	Y	First NM	First Name	FST_NAME	S_CONTACT		Pick Map/User Entry
N	N	MI	Middle Name	MID_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Preferred	Alias	ALIAS_NAME	S_CONTACT		Pick Map/User Entry
N	N	Prefix	M/M	PER_TITLE	S_CONTACT		Pick Map/'PickList MrMs' - Picklist
Y	N	Suffix	Suffix	PER_TITLE_SUFFIX	S_CONTACT		Pick Map/'OCTS Suffix Picklist' – Picklist
Y	N	Contact Type	Contact Type	CON_CD	S_CONTACT		'OCTS Contact Type Picklist' – Picklist
N	N	Account	Account	NAME	S_ORG_EXT		'OCTS Account Pick Applet' – Pick Applet
Y	Y	Relationship>Title	Job Title	JOB_TITLE	S_CONTACT		'OCTS Relationship to Case/Issue' – Picklist
N	N	Address	Address	ATTRIB_47	S_CONTACT_X		Pick Map/User Entry
N	N	City	Contact City	MAIDEN_NAME	S_CONTACT		Pick Map/User Entry
N	N	State	Contact State	NATIONALITY	S_CONTACT		Pick Map/'PickList State' – Picklist
N	N	Zip	Zip Code	EMP_NUM	S_CONTACT		Pick Map/User Entry
N	N	Country	Contact Country	EMPLMNT_STAT_CD	S_CONTACT		Pick Map/'PickList Country' – Picklist
Y	N	Country Code	Country Code	ALT_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Home Phone Number	Home Phone #	HOME_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Work Phone Number	Work Phone #	WORK_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Fax Phone Number	Fax Phone #	FAX_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	Mobile Phone Number	Cellular Phone #	CELL_PH_NUM	S_CONTACT		Pick Map/User Entry
N	N	1st E-mail	Email Address	EMAIL_ADDR	S_CONTACT		Pick Map/User Entry

Y	N	2 <sup>nd</sup> E-mail	Secondary Email	NICK_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Hours Available	Hrs Avail	CON_MANAGER_NAME	S_CONTACT		Pick Map/User Entry
Y	N	Time Zone	Time Zone	TZONE_CD	S_CONTACT		Pick Map/'PickList TimeZone' – Picklist
Y	Y	Contact Method	Assistant	CON_ASST_NAME	S_CONTACT		Pick Map/'OCTS Contact Method Picklist' - Picklist
Y	N	Special Note/SME	Comment	COMMENTS	S_CONTACT		User Entry
N	Y						

## Appendix B-9: Activities List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Activity Type	Type	TODO_CD	S_EVT_ACT	Activities / Attachments	PickList Action Type
Y	N	Case #	SR Number	SR_NUM	S_SRV_REQ		Pick Map
N	Y	Description	Description	NAME	S_EVT_ACT		User Entered
N	N	Last Name	Contact Last Name	LAST_NAME	S_CONTACT		SR Contact Pick Applet
N	N	First Name	Contact First Name	FST_NAME	S_CONTACT		SR Contact Pick Applet
N	N	Created By	Created By Name	CREATOR_LOGIN	S_EVT_ACT		
N	N	Account	Account Name	NAME	S_ORG_EXT		OCTS SR Account Pick Applet
N	N	Site	Account Location	LOC	S_ORG_EXT		Pick Map
N	N	Created	Created	System Generated Field	N/A		Application Populated
N	N	Priority	Priority	EVT_PRIORITY_CD	S_EVT_ACT		PickList Activity Priority
N	N	Status	Status	EVT_STAT_CD	S_EVT_ACT		PickList Action Status
N	Y	Assigned To	Owned By	OWNER_LOGIN	S_EVT_ACT		PickList Owned By
N	N	Due	Start Date	APPT_START_DT	S_EVT_ACT		User Entry / Calendar
N	N	Planned Start	Planned	TODO_PLAN_START_DT	S_EVT_ACT		User Entry / Calendar
N	N	Planned Completion	Planned Completion	TODO_PLAN_END_DT	S_EVT_ACT		User Entry / Calendar

N	N	Actual Start	Started	TODO_ACTL_START_DT	S_EVT_ACT		User Entry / Calendar
N	N	Actual Completion	Done	TODO_ACTL_END_DT	S_EVT_ACT		User Entry / Completion
Y	N	Duration	Duration Minutes	ACD_CALL_DURATION	S_EVT_ACT		Calculated
Y	N	Comments	Comment	COMMENTS	S_EVT_ACT		User Entry
N	Y	New	Row Status	ROW_STATUS	S_EVT_ACT		Application Populated

## Appendix B-10: Activities Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Activity Type	Type	TODO_CD	S_EVT_ACT		PickList Action Type
Y	N	Case #	SR Number	SR_NUM	S_SRV_REQ		Pick Map
N	Y	Description	Description	NAME	S_EVT_ACT		User Entered
N	N	Last Name	Contact Last Name	LAST_NAME	S_CONTACT		SR Contact Pick Applet
N	N	First Name	Contact First Name	FST_NAME	S_CONTACT		SR Contact Pick Applet
N	N	Account	Account Name	NAME	S_ORG_EXT		OCTS SR Account Pick Applet
N	N	Site	Account Location	LOC	S_ORG_EXT		Pick Map
N	N	Created	Created	System Generated Field	N/A		Application Populated
N	N	Priority	Priority	EVT_PRIORITY_CD	S_EVT_ACT		PickList Activity Priority
N	N	Status	Status	EVT_STAT_CD	S_EVT_ACT		PickList Action Status
N	Y	Assigned To	Owned By	OWNER_LOGIN	S_EVT_ACT		PickList Owned By
N	N	Due	Start Date	APPT_START_DT	S_EVT_ACT		User Entry / Calendar
N	N	Planned Start	Planned	TODO_PLAN_START_DT	S_EVT_ACT		User Entry / Calendar
N	N	Planned Completion	Planned Completion	TODO_PLAN_END_DT	S_EVT_ACT		User Entry / Calendar
N	N	Actual Start	Started	TODO_ACTL_START_DT	S_EVT_ACT		User Entry / Calendar

N	N	Actual Completion	Done	TODO_ACTL_EN D_DT	S_EVT_ACT		User Entry / Completion
Y	N	Duration	Duration Minutes	ACD_CALL_DUR ATION	S_EVT_ACT		Calculated
Y	N	Comments	Comment	COMMENTS	S_EVT_ACT		User Entry

## Appendix B-11: OCTS Literature List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Name	Name	NAME	S_LIT	To actual document	Application Populated
N	N	Description	Description	DESC_TEXT	S_LIT		User Entry
N	N	Literature Type	Sales Tools Type	LIT_CD	S_LIT		User Entry
N	N	Local	Local		S_LIT		User Entry
N	N	Request	LitFileDockReqFlg	FILE.DockReqFlg	S_LIT		User Entry
N	N	Size	LitFileSize	FILE_SIZE	S_LIT		Application Populated
N	N	File Type	LitFileExt	FILE_EXT	S_LIT		Application Populated
N	N	Modified	LitFileDialog	FILE_DATE	S_LIT		Application Populated
N	N	Auto Update	LitFileAutoUpdFlg	FILE_AUTO_UPD_FLG	S_LIT		User Entry
N	N	Internal	Internal	INT_FLG	S_LIT		User Entry
N	N	Literature Items	Form Factor		S_LIT		User Entry
N	N	# of Pages	# of Pages		S_LIT		User Entry
N	N	In Stock?	In Stock?		S_LIT		User Entry

## **Appendix B-12: OCTS Literature Form Applet Data Mapping**

<b>Custom Field?</b>	<b>Required Field?</b>	<b>OCTS View Field Name</b>	<b>Siebel Logical Field Name</b>	<b>Column Name</b>	<b>Table Name</b>	<b>Hyperlink To: Screen/View</b>	<b>Method of Population</b>
N	N	Name	Name	NAME	S_LIT	To actual document	Application Populated
N	N	Description	Description	DESC_TEXT	S_LIT		User Entry

## Appendix B-13: Results List Applet (Cases Screen) Data Mapping

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Name	Name	NAME	S_RESITEM		User Entry
Y	Y	Category	Category	RESITEM_TYPE	S_RESITEM		SR Area Pick Applet
Y	Y	Sub Category	Sub Category	FILE_SRC_TYPE	S_RESITEM		SR Sub-Area Hierarchical Pick Applet
Y	N	Party Effecting	Party Effecting	ORIG_FILE_NAME	S_RESITEM		User Entry
Y	N	Party Effecting Date	Party Effecting Date	X_ATTRIB_04	S_RESITEM_X		User Entry
Y	N	Party Proposing	Party Proposing	FILE_NAME	S_RESITEM		User Entry
Y	N	Party Proposing Date	Party Proposing Date	FILE_DATE	S_RESITEM		User Entry
N	N	Comments	SR Comments	COMMENTS	S_RESITEM		User Entry
N	N	Result	Solution	RESOLUTION_TEXT	S_RESITEM		User Entry
N	N	Created By	Created By Name	LOGIN	S_EMPLOYEE		Application Populated
N	N	Created	Created	System Generated	N/A		Application Populated
Y	N	FAQ	FAQ	FAQ_QUES_TEXT	S_RESITEM		Application Populated
N	N	Status	Status	STATUS_CD	S_RESITEM		PickList Solution Status

## Appendix B-14: Results Form Applet (Case Screen) Data Mapping

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	Name	Name	NAME	S_RESITEM		User Entry
Y	Y	Category	Category	RESITEM_TYPE	S_RESITEM		SR Area Pick Applet
Y	Y	Sub Category	Sub Category	FILE_SRC_TYPE	S_RESITEM		SR Sub-Area Hierarchical Pick Applet
Y	N	Party Effecting	Party Effecting	ORIG_FILE_NAME	S_RESITEM		User Entry
Y	N	Party Effecting Date	Party Effecting Date	X_ATTRIB_04	S_RESITEM_X		User Entry
Y	N	Party Proposing	Party Proposing	FILE_NAME	S_RESITEM		User Entry
Y	N	Party Proposing Date	Party Proposing Date	FILE_DATE	S_RESITEM		User Entry
N	N	Comments	SR Comments	COMMENTS	S_RESITEM		User Entry
N	N	Result	Solution	RESOLUTION_TEXT	S_RESITEM		User Entry
N	N	Created By	Created By Name	LOGIN	S_EMPLOYEE		Application Populated
N	N	Created	Created	System Generated	N/A		Application Populated
Y	N	FAQ	FAQ	FAQ_QUES_TEXT	S_RESITEM		Application Populated
N	N	Status	Status	STATUS_CD	S_RESITEM		PickList Solution Status

## Appendix B-15: Results Attachments List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	Y	File Name	ResFileName	FILE_NAME	S_RESITEM	To attached document	User Selected
N	NW	Size	ResFileSize	FILE_SIZE	S_RESITEM		Application Generated
N	N	Type	ResFileExt	FILE_EXT	S_RESITEM		Application Generated
N	N	Auto Update	ResFileAutoUpdFlg	FILE_AUTO_UPD_FLG	S_RESITEM		Application Generated
N	N	Created On	Created	System Generated	S_RESITEM		Application Generated
N	N	Created By	Created By Name	LOGIN	S_RESITEM		Application Generated
N	N	Description	Description	DESC_TEXT	S_RESITEM		Application Generated
N	N	Local	ResFileDockStatFlg	FILE_DOCK_STA_T_FLG	S_RESITEM		Application Generated
N	N	Request	ResFileDockReqFlg	FILE_DOCK_REQ_FLG	S_RESITEM		Application Generated
N	N	Last Updated	Updated	System Generated	S_RESITEM		Application Generated
N	N	Updated By	Updated By Name	LOGIN	S_RESITEM		Application Generated

## Appendix B-16: Attachments List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Name	ActivityFileName	FILE_NAME	S_ACTIVITY_ATT	To attached document	Application Generated
N	N	Size	ActivityFileSize	FILE_SIZE	S_ACTIVITY_ATT		Application Generated
N	N	Type	ActivityFileExt	FILE_EXT	S_ACTIVITY_ATT		Application Generated
N	N	Modified	ActivityFileDialog	FILE_DATE	S_ACTIVITY_ATT		Application Generated
N	N	Auto Update	ActivityFileAutoUpdFlg	FILE_AUTO_UPD_FLG	S_ACTIVITY_ATT		Application Generated
N	N	Comments	Comment	COMMENTS	S_ACTIVITY_ATT		User Entry

## Appendix B-17: Loan List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Product Id/Product Name	Product Id/Product Name	PROD_ID	S_ASSET		Interface/Conversion
Y	N	Guaranty Amount	Guaranty Amount	ATTRIB_18	S_ASSET_X		Interface/Conversion
Y	N	Guaranty Amount Cd	Guaranty Amount Cd	ATTRIB_04	S_ASSET_X		Interface/Conversion
Y	N	Academic Level Cd	Academic Level Cd	ATTRIB_05	S_ASSET_X		Interface/Conversion
Y	N	Interest Rate Cd	Interest Rate Cd	ATTRIB_06	S_ASSET_X		Interface/Conversion
Y	N	Loan Status Cd	Loan Status Cd	ATTRIB_07	S_ASSET_X		Interface/Conversion
N	N	Enrollment Cd	Enrollment Cd	BUILD	S_ASSET		Interface/Conversion
N	N	Loan Seq No	Loan Seq No	SERIAL_NUM	S_ASSET		Interface/Conversion
N	N	Lender Cd	Lender Cd	REF_NUMBER_1	S_ASSET		Interface/Conversion
N	N	Lender Servicer Cd	Lender Servicer Cd	REF_NUMBER_2	S_ASSET		Interface/Conversion
N	N	School Type	School Type	REF_NUMBER_3	S_ASSET		Interface/Conversion
Y	N	Program Length	Program Length	ATTRIB_34	S_ASSET_X		Interface/Conversion
Y	N	OPEID	OPEID	ATTRIB_35	S_ASSET_X		Interface/Conversion
Y	N	Interest Rate Type	Interest Rate Type	ATTRIB_36	S_ASSET_X		Interface/Conversion
Y	N	Program Length Descr	Program Length Descr	ATTRIB_37	S_ASSET_X		Interface/Conversion
Y	N	School Type Descr	School Type Descr	ATTRIB_38	S_ASSET_X		Interface/

							Conversion
N	N	Product Description	Product Description	DESC_TEXT	S_ASSET		Interface/ Conversion
N	N	Primary Contact Id	Primary Contact Id	PR_CON_ID	S_ASSET		Interface/ Conversion
Y	N	Guaranty Agency Name	Guaranty Agency Name	ATTRIB_40	S_ASSET_X		Interface/ Conversion
Y	N	Lender Name	Lender Name	ATTRIB_41	S_ASSET_X		Interface/ Conversion
Y	N	Academic Level Name	Academic Level Name	ATTRIB_42	S_ASSET_X		Interface/ Conversion
Y	N	Loan Status Descr	Loan Status Descr	ATTRIB_43	S_ASSET_X		Interface/ Conversion
Y	N	School Location	School Location	ATTRIB_01	S_ASSET_X		Interface/ Conversion
N	N	Data Provider Loan Id	Data Provider Loan Id	OWNER_ASSET_NUM	S_ASSET		Interface/ Conversion
N	N	Birth Date	Birth Date	BIRTH_DT	S_CONTACT.		Interface/ Conversion
N	N	Guaranty Date	Guaranty Date	INSTALL_DT	S_ASSET		Interface/ Conversion
Y	N	Outstanding Principal Balance Date	Outstanding Principal Balance Date	ATTRIB_26	S_ASSET_X		Interface/ Conversion
Y	N	Outstanding Interest Balance Date	Outstanding Interest Balance Date	ATTRIB_27	S_ASSET_X		Interface/ Conversion
N	N	Disbursement Date	Disbursement Date	SHIP_DT	S_ASSET		Interface/ Conversion
Y	N	Cancellation Date	Cancellation Date	ATTRIB_28	S_ASSET_X		Interface/ Conversion
N	N	GA Resp Begin Date	GA Resp Begin Date	START_DT	S_ASSET		Interface/ Conversion
N	N	GA Resp End Date	GA Resp End Date	END_DT	S_ASSET		Interface/ Conversion
Y	N	Lender Resp Begin	Lender Resp Begin Date	ATTRIB_29	S_ASSET_X		Interface/

		Date					Conversion
Y	N	Lender Resp End Date	Lender Resp End Date	ATTRIB_30	S_ASSET_X		Interface/Conversion
Y	N	Lender Servicer Resp Begin Date	Lender Servicer Resp Begin Date	ATTRIB_12	S_ASSET_X		Interface/Conversion
Y	N	Lender Servicer Resp End Date	Lender Servicer Resp End Date	ATTRIB_13	S_ASSET_X		Interface/Conversion
Y	N	Loan Status Date	Loan Status Date	ATTRIB_31	S_ASSET_X		Interface/Conversion
Y	N	Enrollment Effective Date	Enrollment Effective Date	ATTRIB_32	S_ASSET_X		Interface/Conversion
Y	N	Anticipated Completion Date	Anticipated Completion Date	ATTRIB_33	S_ASSET_X		Interface/Conversion
N	N	Date Entered Repayment	Date Entered Repayment	REGISTERED_DT	S_ASSET		Interface/Conversion
N	N	Period Begin Date	Period Begin Date	WARRANTY_START_DT	S_ASSET		Interface/Conversion
N	N	Period End Date	Period End Date	WARRANTY_END_DT	S_ASSET		Interface/Conversion
Y	N	Interest Rate	Interest Rate	ATTRIB_14	S_ASSET_X		Interface/Conversion
Y	N	Outstanding Principal Balance	Outstanding Principal Balance	ATTRIB_15	S_ASSET_X		Interface/Conversion
Y	N	Outstanding Interest Balance	Outstanding Interest Balance	ATTRIB_16	S_ASSET_X		Interface/Conversion
N	N	Total Disbursed	Total Disbursed	QTY	S_ASSET		Interface/Conversion
Y	N	Total Cancelled	Total Cancelled	ATTRIB_17	S_ASSET_X		Interface/Conversion
Y	N	Current Lender Servicer Name	Current Lender Servicer Name	ATTRIB_02	S_ASSET_X		Interface/Conversion

## Appendix B-19: Loan Form Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	No Display	Loan Type Cd	NAME	S_PROD_INT		Interface/Conversion
N	N	Product Id/Product Name	Product Id/Product Name	PROD_ID	S_ASSET		Interface/Conversion
Y	N	Guaranty Amount	Guaranty Amount	ATTRIB_18	S_ASSET_X		Interface/Conversion
Y	N	Guaranty Amount Cd	Guaranty Amount Cd	ATTRIB_04	S_ASSET_X		Interface/Conversion
Y	N	Academic Level Cd	Academic Level Cd	ATTRIB_05	S_ASSET_X		Interface/Conversion
Y	N	Interest Rate Cd	Interest Rate Cd	ATTRIB_06	S_ASSET_X		Interface/Conversion
Y	N	Loan Status Cd	Loan Status Cd	ATTRIB_07	S_ASSET_X		Interface/Conversion
N	N	Enrollment Cd	Enrollment Cd	BUILD	S_ASSET		Interface/Conversion
N	N	No Display	Loan Seq No	SERIAL_NUM	S_ASSET		Interface/Conversion
N	N	Lender Cd	Lender Cd	REF_NUMBER_1	S_ASSET		Interface/Conversion
N	N	Lender Servicer Cd	Lender Servicer Cd	REF_NUMBER_2	S_ASSET		Interface/Conversion
N	N	School Type	School Type	REF_NUMBER_3	S_ASSET		Interface/Conversion
Y	N	Program Length	Program Length	ATTRIB_34	S_ASSET_X		Interface/Conversion
Y	N	No Display	OPEID	ATTRIB_35	S_ASSET_X		Interface/Conversion
Y	N	Interest Rate Type	Interest Rate Type	ATTRIB_36	S_ASSET_X		Interface/Conversion
Y	N	Program Length	Program Length Descr	ATTRIB_37	S_ASSET_X		Interface/

		Descr					Conversion
Y	N	School Type Descr	School Type Descr	ATTRIB_38	S_ASSET_X		Interface/ Conversion
N	N	No Display	Product Description	DESC_TEXT	S_ASSET		Interface/ Conversion
N	N	Primary Contact Id	Primary Contact Id	PR_CON_ID	S_ASSET		Interface/ Conversion
Y	N	Guaranty Agency Name	Guaranty Agency Name	ATTRIB_40	S_ASSET_X		Interface/ Conversion
Y	N	Lender Name	Lender Name	ATTRIB_41	S_ASSET_X		Interface/ Conversion
Y	N	Academic Level Name	Academic Level Name	ATTRIB_42	S_ASSET_X		Interface/ Conversion
Y	N	Loan Status Descr	Loan Status Descr	ATTRIB_43	S_ASSET_X		Interface/ Conversion
Y	N	No Display	School Location	ATTRIB_01	S_ASSET_X		Interface/ Conversion
N	N	Data Provider Loan Id	Data Provider Loan Id	OWNER_ASSET_NUM	S_ASSET		Interface/ Conversion
N	N	Birth Date	Birth Date	BIRTH_DT	S_CONTACT.		Interface/ Conversion
N	N	Guaranty Date	Guaranty Date	INSTALL_DT	S_ASSET		Interface/ Conversion
Y	N	Outstanding Principal Balance Date	Outstanding Principal Balance Date	ATTRIB_26	S_ASSET_X		Interface/ Conversion
Y	N	Outstanding Interest Balance Date	Outstanding Interest Balance Date	ATTRIB_27	S_ASSET_X		Interface/ Conversion
N	N	Disbursement Date	Disbursement Date	SHIP_DT	S_ASSET		Interface/ Conversion
Y	N	Cancellation Date	Cancellation Date	ATTRIB_28	S_ASSET_X		Interface/ Conversion
N	N	GA Resp Begin Date	GA Resp Begin Date	START_DT	S_ASSET		Interface/ Conversion
N	N	GA Resp End Date	GA Resp End Date	END_DT	S_ASSET		Interface/

							Conversion
Y	N	Lender Resp Begin Date	Lender Resp Begin Date	ATTRIB_29	S_ASSET_X		Interface/Conversion
Y	N	Lender Resp End Date	Lender Resp End Date	ATTRIB_30	S_ASSET_X		Interface/Conversion
Y	N	Lender Servicer Resp Begin Date	Lender Servicer Resp Begin Date	ATTRIB_12	S_ASSET_X		Interface/Conversion
Y	N	Lender Servicer Resp End Date	Lender Servicer Resp End Date	ATTRIB_13	S_ASSET_X		Interface/Conversion
Y	N	Loan Status Date	Loan Status Date	ATTRIB_31	S_ASSET_X		Interface/Conversion
Y	N	Enrollment Effective Date	Enrollment Effective Date	ATTRIB_32	S_ASSET_X		Interface/Conversion
Y	N	Anticipated Completion Date	Anticipated Completion Date	ATTRIB_33	S_ASSET_X		Interface/Conversion
N	N	Date Entered Repayment	Date Entered Repayment	REGISTERED_DT	S_ASSET		Interface/Conversion
N	N	Period Begin Date	Period Begin Date	WARRANTY_START_DT	S_ASSET		Interface/Conversion
N	N	Period End Date	Period End Date	WARRANTY_END_DT	S_ASSET		Interface/Conversion
Y	N	Interest Rate	Interest Rate	ATTRIB_14	S_ASSET_X		Interface/Conversion
Y	N	Outstanding Principal Balance	Outstanding Principal Balance	ATTRIB_15	S_ASSET_X		Interface/Conversion
Y	N	Outstanding Interest Balance	Outstanding Interest Balance	ATTRIB_16	S_ASSET_X		Interface/Conversion
N	N	Total Disbursed	Total Disbursed	QTY	S_ASSET		Interface/Conversion
Y	N	Total Cancelled	Total Cancelled	ATTRIB_17	S_ASSET_X		Interface/Conversion
Y	N	Current Lender Servicer Name	Current Lender Servicer Name	ATTRIB_02	S_ASSET_X		Interface/Conversion

## Appendix B-19: Customer Satisfaction Survey Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Survey Date	Created	System Generated	N/A		Application populated
N	N	Service Accessible?	How easy or hard was it to reach us?	ACCESSIBLE_CD	ACCESSIBLE_CD		User Entered
N	N	Knowledgeable Reps?	Were the reps you talked to knowledgeable?	KNOWLEDGABLE_CD	ACCESSIBLE_CD		User Entered
N	N	Timely Resolution?	Was your issue addressed in a timely manner?	TIMELY_CD	ACCESSIBLE_CD		User Entered
N	N	Resolved Satisfactorily	Is your issue truly resolved?	RESOLVED_CD	ACCESSIBLE_CD		User Entered
N	N	Overall Rating	How would you rate your overall satisfaction?	OVERALL_CD	ACCESSIBLE_CD		User Entered
N	N	Additional Comments	Comments	COMMENTS	ACCESSIBLE_CD		User Entered

## Appendix B-20: Notes List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Field Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Date Created	Created	CREATED	S_NOTE_ACCNT		User Entry
N	N	Created By	Created By Name	LOGIN	S_EMPLOYEE		Application Populated
N	N	Note	Note	NOTE	S_NOTE_ACCNT		User Entry
N	N	Note Type	Note Type	NOTE_TYPE	S_NOTE_ACCNT		User Entry

## Appendix B-21: My To Do List Applet Data Mapping

Custom Field?	Required Field?	OCTS View Display Name	Siebel Logical Field Name	Column Name	Table Name	Hyperlink To: Screen/View	Method of Population
N	N	Completed	Done Flag		S_EVT_ACT		User Entry
N		Priority	Priority	EVT_PRIORITY_CD	S_EVT_ACT		User Entry
N	N	Due	Start Date	APPT_START_DT	S_EVT_ACT		User Entry
N	N	Description	Description	NAME	S_EVT_ACT	Activities/Attachments	User Entry
N	N	Actual Completion	Done	TODO_ACTL_END_DT	S_EVT_ACT		User Entry